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ABSTRACT

This report is designed to raise issues and concerns which will affect the successful implementation of an education and training program once an online public access catalog (OLPAC) has been installed in the Kennedy Library at California Polytechnic State University (Cal Poly), San Luis Obispo. Information presented in the document was gathered from sources including academic library experiences published within the last five years, a telephone survey of academic librarians representing a diversity of locations and variety of OLPAC systems, and vendor-supplied promotional materials. A discussion of staff concerns recommends beginning a staff training program six months prior to the time the OLPAC will be ready for public access and assigning the responsibility for staff and user training to one individual, including the preparation of instructionally related materials. A consideration of users and online catalogs briefly summarizes the Online Public Access Catalog Evaluation Project funded by the Council on Library Resources (CRL) in 1981, and discusses such concerns as the value of online catalog instruction, how users learn to use the catalog, user acceptance of and problems with OLPACs, and the budgetary impact of OLPACs on reference service. Finally, six specific recommendations for the Kennedy Library at CAL Poly are presented. References to 26 sources are provided. (KM)

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TRAINING CONCERNS FOR AN ONLINE PUBLIC ACCESS CATALOG

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Introduction

The purpose of this report is not to present a sample training program for an Online Public Access Catalog (OLPAC). Instead, it is intended to raise issues and concerns which will affect the successful implementation of an education and training program once an OLPAC is installed in the Kennedy Library, Cal Poly, San Luis Obispo.

At present, it is unclear if the manual card catalog will be phased out, frozen, or closed (yet visible), and if public service personnel will be required to continue instruction in card catalog usage in addition to addressing a completely different type of instruction required by an OLPAC. This issue will need to be fully explored and decided since the Library will soon be facing instructional demands of a greater intensity than we have experienced to date, with our few CLSI-based terminals functioning as public access catalogs. By maintaining two catalogs (manual and automated), we will increase costs, may confuse the user, and could influence the user's ability to successfully retrieve desired information.

Another issue which will need to be resolved is the content of the database. For example, users may associate the OLPAC not only with books, periodicals, serials, audiovisual materials, documents, and manuscripts, but also with journal articles. Will this library, at some future date, mount local databases which were previously only available through remote online systems? These bibliographic databases suggest special instructional and cost considerations, but may not be outside the realm of planning. For the purposes of this report, however, attention will not be focused on this issue.

Methodology

Information presented in this document was gathered from a myriad of sources -- a literature search for documented academic library experiences published within the last five years; a telephone survey of academic librarians representing a diversity of locations and variety of OLPAC systems; and vedor-supplied promotional materials.

Because the latter type of information is subject to rapid change, and library experiences are valid indicators for only a particular point in time, the information presented in this report should not be construed as a definitive report. This document will need to be revised as

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we draw closer to an actual OLPAC implementation date. However, for preliminary planning and discussion purposes, it will serve as a baseline from which to begin.

Educational Program

A. Staff

Since any online catalog is likely to complicate instructional efforts (Kenney and Wilson, 1985), it is recommended that an educational program begin with staff training. Such a program should not rely solely upon vendor trainers or vendor materials. Instead, training should begin 6 months prior to the OLPAC being ready for public access, and should consist of two tiers:

--training for all staff members
--advanced training for those who will work with the public in departments or at the Information Desk

Responsibility for this, and subsequent user training, should be assigned to one individual.

Evidence exists for the hiring of additional personnel due to OLPAC demands (Kenney and Wilson, 1985; Seiden, 1987), and for the creation of a new title for this individual to accurately describe his/her functions and/or duties:

(1) Project Manager for User Education (Virginia Tech)
(2) Coordinator of Online Catalog User Services (University of Illinois)
(3) Coordinator of Automated Procedures (Northwestern)
(4) Coordinator for Library Automation (Ohio State)
(5) Library Education Officer (UC Berkeley)
(6) Orion User Services Librarian (UCLA)

Not only does this individual take primary responsibility for educating library staff and users, but devotes time to instructional outreach activities such as targeting and educating key campus groups (e.g. President's Council, Faculty Library Committee) whose support will help to insure the successful political and psychological acceptance of the online catalog (Fahey and Campbell, 1985).

Furthermore, the individual responsible for coordinating OLPAC education and training activities should possess knowledge of instructional processes and be actively involved in user-oriented "behind the scenes" work such as

(1) collaborating with the vendor in designing screen displays, online tutorials, help screens, and error messages which will be clearly understood by the novice user (McDonald and Searing, 1983).

(2) writing non-screen, point-of-use instructional aids in the form of:

a. quick and easy instructions which convey simplicity and brevity --bookmarks, command charts, 1-page handouts, pocket guides, signs, etc.

b. detailed instructional materials -- brochures, dial-up access guides, flip charts with examples of full and brief displays, information guides on the OLPAC, question and answer sheets, self-paced exercises, user manuals, etc.

c. teacher support materials -- behavioral objectives, model lesson plans, storyboards for audiovisual presentations (slides or video), transparency kits, etc.

All instructionally-related materials will need time and funds to be developed, pre-tested, evaluated, and revised before being released for public use.

The Arizona State University Library formulated a committee one year prior to public access to design and implement a staff training program for those individuals who would be assisting the public (Sager, 1986). The Virginia Tech Library created an advisory group which met for two months to design staff training materials, and then implemented weekly staff workshops for another two months prior to public access (Kenney and Wilson, 1985). Georgia State University began its staff training program six months prior to the OLPAC "coming up" for the public (Agnew, 1985).

These staff training programs presented such information as:

(1) overview and description of the OLPAC capabilities, contents, weaknesses, omissions

(2) comparisons of system architecture to previously used manual and automated systems

(3) screen display interpretations

(4) operational commands necessary to gain access to the file indexes

(5) keyboard and support equipment (printer) operation

(6) practice exercises and discussion of results

(7) strategies with communicating with patrons (how to cope with a constant pool of new users who may be anxious, confused, or frustrated; how to resolve problem searches; how to develop alternative search strategies)

(8) evaluation

As previously stated, it is recommended that a timeframe of 6 months prior to OLPAC implementation be adopted for staff training, and that one librarian working with a committee of two others be responsible for the planning, development, implementation, and evaluation of staff training.

B. Users

In 1981, the Council on Library Resources (CRL) funded a national study to learn more about users' assessments of online catalogs. This was a collaborative and cooperative effort among five groups which produced and analyzed a questionnaire to assess user attitudes of online catalogs in public and academic libraries. These groups were

--Research Libraries Group
--Library of Congress
--J.R. Matthews and Associates, Inc.
--Online Computer Library Center (OCLC)
--University of California

The study is known as the Online Public Access Catalog Evaluation Project, and it examined 17 online catalog installations at 29 institutions in the United States. Both users (8000) and nonusers (4000) were surveyed for their attitudes about the systems, and other methodologies included interviews with library staff members, online monitoring studies, and analysis of software features.

We know from the CRL studies that patron education must be different from that of the traditional card catalog since the tools are obviously different, and patron comfort and familiarity with manual catalogs are lost with online catalogs (Markey, 1983). Likewise, it is likely that online catalogs may attract people who have limited experience with the card catalog (Matthews, 1986).

Debate exists as to the value of online catalog instruction for users. Some feel that the circumstances of online catalog use are such that patrons can learn to use it with only minimal instruction (Moore, 1981; Borgman, 1983; Matthews, 1983). Others advocate 45- 50 minute training workshops several times per week (Kenney and Wilson, 1985; Byars 1986,) or special programs for new and advanced users, supplemented by refresher workshops for inactive users (Van Pulis, 1985). Still others, claim that experience is the best teacher (Aaron, 1987). Of course, these opinions are all promulgated upon particular system experiences and may vary from OLPAC to OLPAC.

How users learn to use the catalog is also a controversial issue. Research show that as many as 59% of

users can learn to use an online system from printed instructions (Steinberg and Metz, 1984). Other studies indicate that learning can occur from library staff members, firends, formal workshops, and help screens (Kenney and Wilson, 1985; Fahey and Campbell, 1985).

Despite this conflicting data, what remains important is the selection of a system which will accomodate a variety of user skill levels from the naive to the sophisticated since access points are now more numerous than the card catalog, and instruction must be conceptually different. Research in the field of cognitive psychology emphasizes the importance of teaching about the structural framework of an online system (Byars, 1986). Usage will increase as patrons search on features not previously available (truncation, limiting, boolean combinations) depending upon need level (menu, command, browse) and convenience requirements (sorting records before printing).

Those who work with public access terminals should be prepared for a consistent increase in usage due to the greater availability of search options, the technological novelty of the system, and the willingness of inexperienced users to ask for help since it can be safely assumed that "all users are new users" and prior knowledge is not expected. However, care must be taken not to lure users into a false sense of security (Arret, 1985) and confidence concerning the comprehensiveness of the database and knowledge required to use it effectively (Byars, 1986). Trainers should also be aware that research indicates subject searches are the most frequent form of student searching (Markey, 1983; Agnew, 1985; Fahey and Campbell, 1985), while faculty searches show a preference for author searching (Sullivan and Seiden, 1985) or known-item searching (Fahey and Campbell, 1985).

Despite the optimistic reports in the literature about patron acceptance of online catalogs, user problems have also been documented (Fahey and Campbell, 1985; Sullivan and Seiden, 1985). These are not necessarily system-specific and include:

(1) Misconceptions about online catalog capabilities and database contents (Steinberg and Metz, 1984). Satisfaction with the results may not represent what is actually available from the system, and it is not clear if an association exists between positive attitudes and searching performance (Byars, 1986).

(2) Punctuation and spelling errors (Moore, 1981)

(3) Under-utilization of system features such as keyword searching, truncation, etc. (Kern-Simirenko, 1983)

(4) Error repetition, although it declines as the length of the session increases (Tolle, 1983). However, repeated errors may occur if the patron is an infrequent user of the system.

(5) Finding the correct subject heading (Markey, 1986) This may dissipate if the system assists in the selection of subject vocabulary, facilitates browsing, or includes labelled subject heading fields in the bibliographic record.

(6) Increasing the result when no or few records are retrieved (Markey, 1986). This can be helped by having cross-references available online, or automatic truncation of search input terms.

(7) Reducing the result when too many records are retrieved (Markey, 1986). A system which provides for boolean capabilities, limit prompts, or suggests relevant subject subdivisions may help.

Depending upon the complexity and sophistication of the online catalog system, some of these problems may be easily resolved, or will require the intervention of human instruction. Matching the appropriate instructional strategy to each of these user problems is not an easy task, nor is justifying the positive aspects of the library's choice of a system while candidly representing its inconsistencies (Byars, 1986).

The novelty of automation may entice users to the online catalog, but it may not be a sufficient hook to attract them to scheduled workshops (Fahey and Campbell, 1985). Reports indicate that student workshops are poorly attended (Byars, 1986) and the least effective form of instruction (Seiden, 1987). Training of initial student users is more successful if provided at the point-of-use (Wilson, 1984; Seiden, 1987; Watson, 1987), particularly when users express a particular need in using the catalog.

Point-of-use instructional materials can be low in cost compared to other forms of instruction (e.g. media). Flip charts, for example, which can be portable or attached to each terminal are durable and easily updated. Their usage is maximized when combined with faculty-promoted course-integrated instruction.

Studies show that student motivation toward library use is highly influenced by faculty members, yet faculty are not as receptive to point-of-use instruction as students (Fahey and Campbell, 1985). Approaches to online catalog instruction for faculty may be more successful if tailored to small seminars using large screen projection equipment.

The CRL study showed that clear instructions and a well

trained staff are important for successful catalog retrieval. Practical experience indicates that indepth reference consultation time will increase, and it will not be uncommon for instructional personnel to spend from 10-15 minutes in an online catalog question (Watson, 1987).

Until a system is chosen, and the number of public access terminals decided, it is not now possible to assign a budgetary figure to the impact of an online catalog on reference service. However, it is possible to suggest that the following items may increase associated costs:

(1) materials -- planning, development, production, testing, evaluating, revising. These materials include bookmarks, brochures, charts, exercises, guides, handouts, manuals, signs.

(2) equipment -- a separate terminal for use with the large screen projector should be available for group presentations.

(3) personnel -- the impact is unclear. It seems unlikely that the library will be able to hire more professionals, but additional student assistants may be needed to help with the initial user point-of-use training efforts.

(4) dial-up access -- ports, instructional materials, personnel to assist with telephone inquiries particularly associated with keyboard problems and screen interpretation.

One library has plans to close its catalog and transfer the money spent on card production to the OLPAC budget to help support instructional efforts. This same library may institute a fee to outside users to help defray dial-up access costs (separate instructional manuals, extra ports, etc.). Should dial-up access be extended not only to the campus community (e.g. dorms, offices) but to the San Luis Obispo community, adjustments to the public services budgets may need to be made. Some libraries have opened their collections to local communities only to discover an unanticipated increase in inter-library loan requests. Matthews (1986) indicates that users want dial-up access, but poses the ultimate question: "How will we handle questions about search problems when we can't see the user's screen?"

SUMMARY

Continuous and systematic communication with technical services personnel and vendor representatives will be necessary to any instructional effort. Monitoring of system reports regarding search transactions, attitudinal and user surveys, and close observation of patron actions will help to evaluate instructional efforts and system user supports.

Awareness of the content of the database, sequencing of information displayed, vocabulary words, typography (data labels, upper and lower case letters), punctuation (including abbreviation) and system features will influence the type of educational program designed and the formats of instructional materials produced, tested, and implemented.

It is recommended that the Library:

(1) Decide if both the manual and the online catalog are to be taught.

(2) Determine the content of the database to be taught.

(3) Train all staff members, but offer advanced staff training to those who will be working with the public in departments and/or at the Information Desk.

(4) Assign responsibility for all training to one librarian who will work with a committee of two other librarians.

(5) Begin staff training 6 months prior to public access. Therefore, the training librarian and committee members need to be determined at this time.

(6) Recognize that precise cost figures for instructional efforts will be dependent upon the capabilities of the system selected, but that funds may be needed for additional student assistants, instructional materials, a separate training terminal, and dial-up access ports.

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